



LIVE ON
BUILD YOUR JEWISH LEGACY

Live On Sustaining Legacy Plan 2008 to 2010

Sustaining plans must include the following sections:

I. The Case Statement

- A. Internal Case Statement (for your organization): Explain why endowment building and legacy giving is important to your organization.
- B. External Case Statement(s) (for your donors): Explain why your donor may wish to leave a legacy. Case statements may be tailored to the specific passions of donors.

II. Plan for Existing Legacy Society Donors

If you do not yet have a legacy society, your plan must include starting one to recognize and steward current bequest and planned gift donors.

- A. Name of Society.
- B. Designated Leadership for Society.
- C. Current Number of Donors in Society.
- D. Gift Type and Confirmation: Chart containing each donor's name, a description of the type of gift they gave, and whether or not there is a Donor Record Form or other confirmation of their planned gift.
- E. Relationship Managers: Assign a board member, staff member, or volunteer to act as the relationship manager for each donor.
- F. Legacy Society Activity Plan: Plan must include ongoing appreciation using fundraising events and other special purpose meetings or educational opportunities, personal visits, calls, letters, listing of donors, invitations, etc.
- G. Cultivation Plan: Describe strategy for further conversations or cultivation of current legacy donors to maintain and upgrade their gifts. At a minimum if a Donor Record Form has been secured for the donor there should be one conversation or contact every two years about any changes to the will. If there is no Donor Record Form, there should be one visit on the first anniversary of the gift to engage the donor in a discussion about documentation of their gift. Effort should be made to complete the Donor Record Form or an alternative record-keeping document.
- H. Help Needed: Describe where you need help to implement the above.

III. Plan for Pending Gifts: Donors Already Solicited Without Commitments

- A. Plan: Describe plan for further conversations and solicitations of donors who have been solicited (by your Live On team in 2006 or 2007) but have not yet made a commitment.

- B. Solicitation Strategy: Describe your solicitation strategy for each donor.
- C. Solicitor Assigned: Assign a solicitor and for each donor using the chart below.
- D. Help Needed: Describe where you need help to implement the above.

IV. Plan to Solicit New Legacy Donors

- A. Target Groups: Describe your target groups of prospects. Be specific and list names.
- B. Individualized Solicitation Strategies: Describe your solicitation strategy for each donor.
- C. Solicitor Assigned: Assign a solicitors to each prospect.
- D. Live On Donor Solicitation Chart: Complete the Donor Solicitation Chart below.
- E. Thanking and Closing: Describe thanking procedures and legacy society hand off for closed gifts.
- F. Recording Policies: Describe Donor Record Form policies and procedures.
- G. Help Needed: Describe where you need help to implement the above.

V. Plan for Honoring Donors after Their Lifetime

- A. Estate Contact: Assign a member of your organization to serve as a contact for the estate.
- B. Honoring Policy: Describe your policies and procedures.
- C. Maintenance of Donor Records and Legacy Society/Appreciation: Describe where records are kept and who is responsible for their upkeep.
- D. Maintaining Contact: Describe how you plan to keep in contact with the late donor's family and continue to build relationships, if appropriate.
- E. Help Needed: Describe where you need help to implement the above.

VI. Leadership and Management Necessary to Implementing the Sustaining Legacy Plan

- A. Responsible Leadership: Assign responsibility for overseeing the implementation of the plan. Describe their role(s) within the organization.
- B. Staff Management and Implementation: Assign staff member to manage the plan.
- C. Participants: Assign responsibility for implementing the plan. Describe their role(s) or position(s) within the organization. Assign responsibility for tracking gifts. Designate an individual who will communicate with Rose Community Foundation to report closed gifts and send Donor Record Forms, etc.
- D. Training Session Attendees: List those who will attend Live On training sessions.

- E. Board Updates: Describe how often Live On plans, goals and progress will be discussed at board meetings.
- F. Future Leadership and Participants: Explain your process for recruitment and training of volunteer and staff leadership to continue legacy programs into the future.
- G. Big Picture Fundraising: Describe how planned giving will be connected to other fundraising efforts.
- H. Help Needed: Describe where you need help to implement the above.

VII. Marketing Plan

- A. Strategies and Specific Tactics: Describe marketing strategies you will use to promote legacy giving for endowments. List specific tactics like events, direct mail, newsletters, website posting, etc. Include information about frequency of use.
- B. Education and Publicity: List all the ways you will ensure your constituency knows about and understands legacy giving.
- C. Help Needed: Describe where you need help to implement the above.

